# Performance Management End of Year Process

System User Guide - Manager

| # | End of Year Review Workflow Overview |
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| 1. | Review your **My Team** list and ensure all is correct. Ensure your team has completed their self-reflection updates in the **Progress Notes** tab before beginning. |
| 2. | Review the goal plan (including in-line goal comments and progress notes) of each of your direct reports and assign ratings. Include feedback using the **Progress Notes** tab in the navigation bar. Assign your ratings for Development goals and Performance goals. Submit for Second-level Sign-off. |
| 3. | Participate in the End of Year Review conversation with your direct report. Be sure to review your direct report's goal plan and progress notes beforehand, as it will streamline this conversation. During this conversation, you and your direct report will review the progress they have made and plan for extra support where needed in the coming fiscal year. |
| 4. | Direct report will acknowledge the conversation in the system. |

| # | MANAGER/FACULTY MANAGER: Updating Progress Notes |
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| 1. | In the navigation bar at the top of your screen, select the **Progress Notes** tab. |
| 2. | Click on the corresponding direct report's name to review the **Progress Notes** |
| 4. | Click on the **New Progress Note** button. A box will appear in the center of your screen. Post your own End of Year Review in **Progress Notes** reflecting on the employee's progress to goals. Click **Save**. |
| 5. | After saving the progress note, you will have the option to upload files. Click on the icon on the right-hand side of the line item. Select **Show Details,** and a pop-up box will appear. Select the "Files" tab at the top of the pop-up box and upload any related files. |

| # | MANAGER/FACULTY-MANAGER: Reviews & Assigns Ratings to Submit for Second Level Sign-off |
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| 1. | Click on the goal plan of your direct report and review in-line goal comments ( ) within the goal plan. |
| 2. | Click on the **Development Goal Edit** box. Assign a rating from the dropdown box. Click **Save**. |
| 3. | Click on the **Performance Goal Edit** box. Assign a rating from the dropdown box. Click **Save**. |
| 4. | Click **Submit for Approval.** Note: If the ratings are all "Does Not Meet" or "High," the system will send the goal plan to your manager for second level approval. |
| 5. | **Did you know?** You can have multiple tabs of the Performance Management system open to review Progress Notes tab and the direct report's goal plan at the same time. Alternatively, consider sending a PDF of their goal plan to your email to review in tandem to your assignment of ratings. |

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| # | SECOND LEVEL MANAGER: Reviews & Approves Final Ratings |
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| 1. | Open the employee's goal plan and review the **Progress Notes.** |
| 2. | If the manager's ratings are in alignment with the summary of progress towards goals as detailed in the Progress Notes, click **Approved**. If not, click **Reject** and return for modification with comments. Comments will go to the Manager's email and are not seen by the employee. |
| 3. | Manager will resubmit in accordance with the comments shared. |

| # | MANAGER/FACULTY-MANAGER: Scheduling the EOY Meeting & Share Ratings With Employee |
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| 1. | Schedule time with each of your direct reports to review their progress following second-level approval. |
| 2. | At least 24 hours prior to the meeting, click the **Share Ratings with Employee** button to open the view for your direct report to see their ratings. |
| 3. | At the Review Meeting discuss:<br>1. Progress of the Development and Performance Goals<br>2. The ratings on all the goals, and the overall rating<br>3. Their on-going development<br>4. Discuss the next year's SMART goals |

| # | MANAGER/FACULTY-MANAGER: Approving the End of Year Review |
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| 1. | The manager receives an email alert once a direct report's goal plan is submitted for approval. |
| 2. | Click **Approve** to close goal plan and finalize for the year. This is an important step as the goal plan will then be available to print as a PDF. Once submitted, they won't be able to be downloaded as a PDF. |

**For more tools and resources, visit the Performance Management page**
https://uhr.rutgers.edu/performance-management/home

**Access the "Help" section directly in the Performance Management System**
https://rutgerstalent.force.com/

**Further questions? Contact us.**
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